# Office of Capital Improvements (OCI) Administrative Order 3-39

November 2005

## **Proposed Revisions to A&E selection**

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## PRE-QUALIFICATION REQUIREMENTS:

Proposed changes to address: pre-qualification, evaluation criteria, ranking system, submittal format, processing efficiencies.

## **Current Requirement/Procedures**

## Pre-Qualification required annually

## Dollars awarded and paid = 5 points out of a total of 100 points

First and Second-Tier required for all projects. Second Tier may be waived by a majority vote form selection committee members

Selection committees consist of 5 members, 2 from user dept, 1 DBD, 2 from other depts. for all size projects

#### **Proposed Requirements/Procedures**

Required every 3 years w/ annual updates.

Failure to report changes will result in a suspension from proposing on County work for a period 3X length of the ineligible period.

Lowest dollars awarded and paid utilized as a tie-breaker.

First -Tier required for all projects. Second-Tier only required for projects with construction values in excess of \$5million unless Second - Tier is specified in the NTPC.

Selection committees for projects with construction cost less than \$5 million - 3 members (min. of 1 from requesting dept. 2 from other depts).

Projects \$5 million or greater - 5 members (min. of 2 members from requesting dept., 3 other depts..) all technically qualified with background experience in services requested.

# Office of Capital Improvements (OCI) Administrative Order 3-39

November 2005

## **Proposed Revisions**

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#### **Current Requirement / Procedures**

## •

CBE/CSBE Compliance review by DBD currently takes place after receipt of proposals (the 3 short-listed proposals are forwarded for DBD review)

Voluminous proposal submittal package Includes 7 forms; affidavits, references.

Professional Services Contract prepared by requesting department. Not always received timely and often deficient in terms and conditions.

Negotiation meeting scheduled by OCI after dept. provides contract.

#### **Proposed Requirements/Procedures**

CBE/CSBE compliance review by DBD of highest ranked firm only. Consultants to cure any noted problems within 7 days of notification by the County.

Streamlined submittal package to include new all encompassing forms (see attached).

Standard contract for all departments to be utilized. Boilerplate applicable to all depts. Special conditions sections provided for additional required language (i.e. special funding or state and or federal requirements).

Draft contract required to be submitted to OCI at time of RTI/A.

Issues with contract terms and conditions must be identified in submittal.

## MIAMI-DADE COUNTY – OFFICE OF CAPITAL IMPROVEMENTS (OCI) ARCHITECT-ENGINEER QUALIFICATIONS – OCI FORM 1

	Section A – Project Inform	nation					
OC	OCI Proiect No. A04-PARK-02 Proiect Name: Country Club of Miami Community & Aquatic Center						
Mea	Measures 15% Goal □ Set-Aside □ CBE □ DBE □						
Firm No.	Section B – Prime Consultant  Complete this section for the prime consultant only; pursuant to Section consultants may only participate on one (1) team when responding to this so proposed team, including key personnel as	1.3 of the NTPC "Teaming Restrictions", prime blicitation. Please attach Table of Organization of					
	Proposer's Name: Miami-Dade Design Associates, Inc.	FEIN: <b>63-8161963</b>					
1	Business Address: 2780 SW 36th Avenue, Suite 602, Miami, FL 331.	33					
•	Contact Person's Name & Title: James D. Smith, AIA, Principal	Addenda Received (Indicate number) 2					
	Telephone Number: (305) 555-1234 Fax Number: (305) 555-2345	E-mail: jsmith@mdda.com					

Firm No.	Section C – Proposed Sub-Consultants  Complete this section for all proposed sub-consultants; pursuant to Section 1.3 of the NTPC "Teaming Restrictions", sub-consultants may only participate on three (3) teams when responding to this solicitation.						
	Sub-Consultant's Name	FEIN:					
2	Gonzalez Engineering Group, Inc.	76-0368924					
3	Consulting Engineering & Technology, Inc.	60-3106124					
4	AMG Consulting Engineers, Inc.	60-3457221					
5	Perkins, Brown & Wallace, LLC	34-2726352					
6	Aquatic Design & Construction, Inc.	60-4472322					
7							
8							
9							
10							

#### Section D - A&E Technical Certification Requirements Fill in this section by indicating which firm on the team, using the numbers shown in Sections B and C, will provide services in the technical categories required in the NTPC; you may list more than one firm per category, if applicable. A&E Technical Category Prime Consultant **Sub-Consultant** Architecture (PRIME) 14.00 1 **Architectural Construction Management (PRIME)** 1 18.00 General Structural Engineering 2, 3 11.00 12.00 General Mechanical Engineering 4 4 13.00 General Electrical Engineering 3 16.00 General Civil Engineering 20.00 5 Landscape Architecture

Non-A&E Services (List all other provided services as applicable)	Prime Consultant	Sub-Consultant
Pool Design Consultants		6
Public Involvement	1	

## Section E – Key Personnel Participation on Similar Type Projects

Fill in this section using the numbers assigned to each firm as shown in Sections B and C.

Please attach Table of Organization of the proposed team, including key personnel as required in	Section B.
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Firm No.	Names of Key Personnel and Role in Similar Type Projects	Similar Type Projects in Section F (Fill in the matrix below using the information listed in Section F. Place "X" under the reference numbers below to indicate participation in same or similar role.)  a b c d e f g h e j							Role in this Project			
1	Tom Clancy, Principal/Contract Director	X	X	X	X	X						Principal/Design Director
1	Jimmy Dean, Principal	X	X	X	X	X						Principal/Contract Director
1	Lawrence Olivier, Project Architect	X	X	X	X							Project Architect
1	Lourdes Gonzalez, Project Architect		X		X	X						Project Architect
1	Mitch Knoll, Project Architect			X	X	X						Project Architect
1	David Wang, Project Architect	X		X	X							Project Architect
1	Julio Perez, Project Architect	X	X	X		X						Project Architect
1	Kwame O'Neal, Project Architect	X	X	X		X						Project Architect
2	Josefina Robirosa, Structural Engineer						X					Structural Engineer
2	Carlos Saenz, Structural Engineer						X					Structural Engineer
3	Richard Easley, Structural Engineer							X				Civil Engineer
3	Wilson Ortiz, Civil Eng./Water & Sewer							X				Civil Engineer
4	Manuel Pantoja, MEP								X			Mechanical/Electrical Engineer
4	Ernesto Palomar, MEP								X			Mechanical/Electrical Engineer
5	Helen Roundtree, Landscape Architect									X	X	Landscape Architect
5	Gerald M. Bush, Landscape Architect									X	X	Landscape Architect
6	Garrett Marlin, Pool Design Consultant											Pool Design Consultant
6	William Cod, Pool Design Consultant											Pool Design Consultant

			Section	n	$\mathbf{F}$ –	Pro	evi	ous Sir	nilar	<b>Typ</b>	e Pro	ojects
List previous	similar	type	projects	in	which	the	kev	personnel	(prime	and/or	sub-co	nsultants)

List previous similar type projects in which the key personnel (prime and/or sub-consultants) listed in Section E have performed work within a ten (10)-year period from the submittal date of this solicitation. Please include a brief description

Reference	NTPC's A Requireme	of the project. Place "Y" or "N" under Meets NTPC's Minimum Requirement to indicomply with same.	cate whether a pro	ject is submitted to
Refe	Meets N'	Project Name and Location	Project Start	Project Completion
	Ň	Project Owner/Owner's Representative's Name/Project Description	Date	Date
a	Y	Murray Park Community Recreational Center, South Miami, FL City of South Miami / Jonathan Price, PM, master planning and development of phased expansion program for city park complex	October 2000	November 2004
b	Y	Miami-Dade Parks and Recreation Miscellaneous Contracts  Miami-Dade Parks & Recreation Department / Manolo Gonzalez, PM, park improvements to various recreation building configurations	June 2001	Estimated 2005
c	N	Martin Luther King Community Center Renovation, Hollywood, FL City of Hollywood Public Works / Steven Jones, Assistant to Director, architectural and engineering services for the renovation of a 30,000 S.F. community center	1999	2000
d	N	Rotunda Building Restoration, Miami Beach, FL  City of Miami Beach / Jorge Chateaubriand, PM, terra cotta façade restoration of the building, including field and laboratory testing of existing building elements	2004	Estimated 2006
e	Y	Stirling Road Branch Library, Broward County, FL Broward County / Steven Harlow, PM, architect of record for a new 20,000 S.F. library	January 1999	September 2001
f	Y	MIA South Terminal Expansion, Miami, FL Perez, Rodriguez & Partners / Alberto Rodriguez, PM, structural engineering and threshold inspections	1996	2005
g	N	Black Point Park & Marinas, Miami, FL	2002	2004

		Miami-Dade Parks & Recreation Department / Jackie Alton, PM, sanitary sewer improvements		
		Tropical Park Equestrian Center, Miami, FL		
h	N	Miami-Dade Parks & Recreation Department / Mary Rodriguez, PM, design of a new 55,000 S.F. equestrian center including stands, stable area and landscaping	March 2001	April 2002
		David A. Kline Orchidarium, Vizcaya Museum & Gardens, Miami, FL		
e	N	Vizcaya Museum & Gardens, George Conrad, Assistant to Director, design of a pergola for the Museum's orchid collection	October 2001	February 2002
		Osceola YMCA Family Center, Osceola County, FL		
	N	YMCA Central Florida / Elizabeth Williams, Risk Manager, design and	January 2002	A
J	1	construction management for the new 50,000 S.F. Osceola Family Center to include	January 2002	August 2002
		baseball fields, basketball courts and walking track.		

## Section G – Prime-Consultant Project Experience/References

Provide one (1) reference of work performed within a ten (10)-year period from the submittal date of this solicitation. Attach additional sheets if necessary.

Reference Project Name/Address: Murray Park Community Recreational Center, 152 SW 10 St., Miami

Reference Project Description: Master Planning and Development of phased expansion program for city park complex

Scope of Services Provided: Architecture and Engineering Services

Professional Fees: \$ 380,000.00 Project Start Date: 10/2000 Project Completion Date: 2004

Reference Company Name: City of South Miami Reference Name: Jonathan Price, Project Manager

Reference Phone Number (305) 663-7461 Fax Number (305) 668-8319 E-mail: jonprice@cityofsouthmiami.net

Should this reference be considered to meet the Minimum Requirement/s? Please check as applicable YES x NO D N/A D

If YES, please denote which Minimum Requirement (s) is/are being met with this reference: 1, 2 and 4

Reference Project Name/Address: Miami-Dade Parks & Recreation Miscellaneous Contract

Reference Project Description: Park improvements to various recreation building configurations

Scope of Services Provided: Architecture and Engineering Services

Professional Fees: \$306,130.00 Project Start Date: 2001 Project Completion Date: 2005

Reference Company Name: Miami-Dade County P&R Reference Name: Manolo Gonzalez, Project Manager Reference Phone Number (305) 755-8076 Fax Number (305) 755-8086 E-mail: mangonzalez@miamidade.gov

Should this reference be considered to meet the Minimum Requirement/s? Please check as applicable YES X NO D N/A D

If YES, please denote which Minimum Requirement (s) is/are being met with this reference: 1, 2 and 4

Reference Project Name/Address: Stirling Road Branch Library, 2000 SE 10 Avenue, Miami

Reference Project Description: 20,000 Sq. Ft. Library

Scope of Services Provided: Architecture and Engineering Services

Professional Fees: \$ 437,238.00 Project Start Date: 6/2003 Project Completion Date: 10/2001

Reference Company Name: Broward County Reference Name: Steven Harlow, Project Manager

Reference Phone Number (954) 357-8873 Fax Number (954) 357-7522 E-mail: <a href="mailto:sharlow@co.broward.fl.us">sharlow@co.broward.fl.us</a>
Should this reference be considered to meet the Minimum Requirement/s? Please check as applicable YES x NO \( \sqrt{N/A} \sqrt{\sqrt{N}} \)

If YES, please denote which Minimum Requirement (s) is/are being met with this reference: 1, 2 and 4

## **Section H – Sub-Consultants Project Experience/References**

Provide one (1) reference of work performed by each of the sub-consultants, within a ten (10)-year period from the submittal date of this solicitation. Attach additional sheets if necessary.

Sub-Consultant's Name: Gonzalez Engineering Group, Inc.

Reference Project Name/Address: MIA-South Terminal Expansion, MIA

Reference Project Description: Airport Terminal Expansion

Scope of Services Provided: Structural Engineering

Professional Fees in \$ 1,547,000.00 Project Start Date: 1996 Project Completion Date 2005

Reference Company Name: Perez Rodriguez & Partners Reference Name: Alberto Rodriguez, P.E.

Reference Phone Number (305) 441-1999 Fax Number (305) 444-2999 E-mail arodriguez@prpdesign.com

Should this reference be considered to meet the Minimum Requirement/s? Please check as applicable YES x NO \( \simegpi \) N/A \( \simegpi \)

If YES, please denote which Minimum Requirement (s) is/are being met with this reference: 3

Sub-Consultant's Name: Consulting Engine Reference Project Name/Address: Black Por Reference Project Description: Sanitary Son Scope of Services Provided: Design and Corporates of Services of Servic	oint Park and Marinas, 930 ewer Improvements onstruction documents, Se tart Date: 2002 Project Com County Park and Recreation Fax Number (305) 755-8946 t the Minimum Requirement	wer Extensions & Pump Stations apletion Date 2004 aReference Name: Jackie Alton, P. E. E-mail jalton@miamidade.gov /s? Please check as applicable YES  NO x N/A
Sub-Consultant's Name: AMG Consulting Reference Project Name/Address: Tropical Reference Project Description: Design Buil Scope of Services Provided: MEP design a Professional Fees in \$ 15,000.00 Project Strafference Company Name EquiDesign Ar Reference Phone Number (305) 461-5002 Should this reference be considered to meet If YES, please denote which Minimum Regions.	I Park Equestrian Center, Id for a new 55,000 Sq. Ft. and Construction Administ tart Date: March 2001 Projectitecture, Inc. Reference Fax Number (305) 461-5003 at the Minimum Requirement	equestrian facility ration services ect Completion Date April 2002 Name Carl Bohm, President B E-mail carlbohm@bellsouth.net /s? Please check as applicable YES □ NO x N/A □
Reference Project Description: Pergola for Scope of Services Provided: Design throug Professional Fees in \$ 40,000.00 Project St Reference Company Name Vizcaya Museu Reference Phone Number (305) 250-9244	the Museum's orchid college construction administrate art Date: October 2001 Promand Gardens Reference Fax Number (305) 285-2005 the Minimum Requirement	tion  oject Completion Date February 2002  Name George Conrad, Assistant to Director  is E-mail gconrad@vizcayamuseum.com  /s? Please check as applicable YES   NO x N/A
Sub-Consultant's Name: Aquatic Design & Reference Project Name/Address: Tamiam Reference Project Description: Design cons Scope of Services Provided: Planning and Professional Fees in \$ 30, 000 Project Start Reference Company Name: Miami-Dade P Reference Phone Number (786) 755-7000 F Should this reference be considered to meet	Construction, Inc. i Aquatic Center, 9700 SW sulting for 50,000 S.F. aqua conceptual design of aqua Date: January 2003 Project ark & Recreation Dept. Re Fax Number (786) 755-7010 the Minimum Requirement	7 24 Street, Miami ntic center tic center tic center tic Completion Date: November 2004 teference Name: Hector Garcia
Reference Project Name/Address:  Reference Project Description:  Scope of Services Provided:  Professional Fees in \$  Reference Company Name  Reference Phone Number	Project Start Date: Fax Number	Project Completion Date Reference Name E-mail
Should this reference be considered to meet If YES, please denote which Minimum Req	•	s? Please check as applicable YES \(\sigma\) NO \(\sigma\) N/A \(\sigma\) t with this reference:

<del></del>		
Sub-Consultant's Name:	· · . · . · . · . · . · . · . ·	
Reference Project Name/Address:		
Reference Project Description:		
Scope of Services Provided:		
Professional Fees in \$	Project Start Date:	Project Completion Date
Reference Company Name		Reference NameE-mail
Reference Phone Number	Fax Number	E-mail
Should this reference be considered to meet	the Minimum Requirement	t/s? Please check as applicable YES □ NO □ N/A □
If YES, please denote which Minimum Req	uirement (s) is/are being me	et with this reference:
Sub-Consultant's Name:		
Reference Project Name/Address:		
Reference Project Description:		
Scope of Services Provided:		
Professional Fees in \$	Project Start Date:	Project Completion Date
Reference Company Name		Reference Name
Reference Phone Number	Fax Number	Reference NameE-mail
		/s? Please check as applicable YES □ NO □ N/A □
If YES, please denote which Minimum Requ	uirement (s) is/are being me	et with this reference:
Section I – Ability	of team member	s to interface with the County
•		project, commitment to satisfy the County's requirements and
	familiarity with Count	ty guidelines.
		rised exclusively of local firms, all of whom have an active
		her current projects within the tri-county area. Critical
depth project related experience.	ach major task will be de	elegated to a design principal or senior associate with in-
	1 11 11 0 11 11 0	
I hereby certify that to the best of my knowledges	edge and belief all the foreg	going information is true and correct.
Authorized Prime Consultant's Representati		Title
	(Print Na	ame)
Signature Authorized Representative		Date
	,	

# Office of Capital Improvements (OCI) Equitable Distribution Program (EDP)

November 2005 Page 1 of 3

## **Proposed Program Revisions**

#### PROGRAM ELIGIBILITY REQUIREMENTS:

Proposed changes to address: newly formed firms receiving work prior to firm participants with longer tenure, eliminate firms with a place of business in Dade without professional staff at local office, increase experience levels, professional commitment, local participation and firm responsiveness.

Current Requirement	Proposed Requirements
A minimum of 1 year in business. Place of business in Miami Dade County for 1 yr at time of application.	A minimum of 2 years in business. Place of business in Miami Dade County for 2 yrs at time of application.
No current requirements regarding staffing.	Require at least one professional A & E staff in Miami Dade office who will also act as the EDP Contact.
Program open twice a year January and June.	Pool all year, at least quarterly.
EPD PSA and Insurance submittal (first time).  Must submit in 10 calendar days.	Must submit within 7 calendar days of notification of being selected for an assignment If fail to submit in allotted time, will forfeit the assignment and repeat violations may be suspended from the program for 180 days.

#### **EDP ASSIGNMENT RESTRICTIONS:**

Proposed changes to: Establish restrictions to allow increases in EDP opportunities to a greater number of participants.

Currently there are no EDP assignment and or compensation thresholds.

OCI may establish thresholds to achieve a more equal distribution of work such as maximum of 10 active assignments and or \$250,000 active EDP awards.

#### **UTILIZATION REPORTS:**

Proposed changes to: Include requirement for at least intermittent Utilization Report submittal since the majority of projects take several years to complete.

EDP Close Out form required at project completion.

Firms will be required to document gross fees and dollar amounts distributed to the sub consultants on all the firms new and existing contracts, including for EDP service orders.

# Office of Capital Improvements (OCI) Equitable Distribution Program (EDP)

November 2005 Page 2 of 3

## **Proposed Program Revisions**

## FIRMS GENERATED FOR AN ASSIGNMENT:

Proposed changes to: Adjust number of firms provided for an assignment in response to Departments requests. Assist in expediting selections and increase the availability of specific expertise.

# 2 prime firms generated per assignment. List will be forwarded to User Department. At least 6 prime firms will be provided (if available). 4 sub-consultants generated for an assignment. Open sub selection but may restrict in the

amongst participants.

#### **POOL ROTATION POSITION:**

Proposed changes to: Adjust the current rotation value to give preference to firm's experience, local offices, as well as work assignment opportunities to existing members.

A firm's position is based on their rotational value RV. RV is calculated based on actual dollars and 65% of potential earnings of dollars awarded in past three years.

Other factors may include the number of years in business, number of years located in Miami Dade County and number of years In the EDP program.

future if sub assignments are not well distributed

Considering a 25% reduction to firms that have been in business for five years or more and a deduction if the firm's headquarters has been in Dade County for five or more years.

A new firm participant with a lower dollar value will not displace any existing participant that has not received minimum threshold of fees (say, \$50,000).

# Office of Capital Improvements (OCI) Equitable Distribution Program (EDP)

November 2005 Page 3 of 3

## **Proposed Program Revisions**

#### **Current Requirement**

## **Proposed Requirements**

#### PROGRAM COMPLIANCE POLICIES

Proposed changes to: Establish stricter policies and sanctions to deal with regular program non-compliance issues.

Refusal of a work assignment could result in a program violation. Three violations could result in program inactivation of 180 days.

Include other non-compliance activities; not responding to dept. or prime inquiry in 48 hrs, failure to submit project proposal within schedule, indicate too busy, refusing work due to lack of interest.

Two violations will result in a 180 day inactivation period and a subsequent violation could result in suspension from the program.

Automatic inactivation for lapsed Pre-Qualification Certification (PQC) and insurance non-compliance inactivation penalty may be assessed. In addition, two subsequent failures to maintain PQC and insurance to result in a potential suspension from the program.

Currently 30 day penalty assessed after issue cured.



## **OCI** Office of Capital Improvements

**Miami-Dade County** 

## **Program Statistical Overview**

The Equitable Distribution Program characteristics and achievements as of July include the following:

- 315 firms have met the eligibility requirements of the EDP.
- 296 firms are currently EDP members; 236 firms are active in the rotation as of June 6, 2005 (60 firms are currently inactive because of lapsed Pre-Qualification certification and/or lapsed insurance).
- 85% of the County's certified Community Business Enterprise (CBE) firms are EDP members.
- 80% of the firms with assignments indicated on their EDP contracts that their principal address is in Dade County.
- 403 total work assignments have been issued to 191 firms.
- 45% of the 403 total work assignments were awarded to CBE prime consultant firms.
- 102 of the total 191 firms participating on an EDP assignment had no previous work opportunity with Miami-Dade County.
- Assignment fees range from \$1,500 to \$150,000 per assignment, with an average fee of \$45,000
- \$18,500,000 in total professional service fees have been awarded to date, representing less than 8% of the County's total active A&E awards since October 2002.
- 63% of the total work assignments have been awarded to minority and or small businesses and to firms who previously had been unsuccessful in acquiring a County contract.
- 98% of the member firms that had previously not had an opportunity to contract with the County have been rotated for a potential assignment.
- 85% of the member firms that had previously not had an opportunity to contract with the County have received an assignment.
- EDP assignments increased 25% from FY 2003 to FY 2004 and, based on current trends, it is anticipated to increase another 50% in FY 2005.

90% of the EDP assignments issued have only utilized one TC for the prime consultant. All A&E requests are subject to review and concurrence by OCI.

Prime TC utilization is as follows:

- 46% architecture
- 12% structural engineering
- 10% landscape architecture
- 6% mechanical/electrical engineering
- 6% civil engineering

Based on individual firm expertise, the number of firms that qualify for these certifications vary. Currently, there is an average of 30 firms per category from which departments may select. There are 13 TCs with very specialized services, such as TC 3.12 Underwater Engineering Inspection, seldom requested by the County. These categories have been utilized for only 8 EDP assignments since the program's inception. If demand increases, we anticipate other firms will branch out into these specialized services and join the five or less firms currently certified to provide such services.

For general program information, firm rotation lists and assignment reports: OCI Website <a href="http://www.miamidade.gov/CICC/home-edp.asp">http://www.miamidade.gov/CICC/home-edp.asp</a> Elizabeth Biba Zabowski at <a href="mailto:biba@miamidade.gov">biba@miamidade.gov</a> or 305-375-2824